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**Balanced Assessment**

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Every summer, when state departments of education release their test scores, education leaders pay close attention to see how their school or district ranks. Classroom teachers, on the other hand, are often frustrated that these data arrive when the tested set of students has already moved on, months after the results would have been useful for guiding instruction.

The fact is that assessments may be useful for one purpose but worthless for other important instructional purposes. Education leaders now understand that a variety of measures are needed to accommodate a variety of goals. The challenge for schools is designing a balanced assessment system using the strengths of summative, interim, and formative assessments to address instructional, accountability, and learning needs. (See "The Quest for Quality" by Stephen Chappuis, Jan Chappuis, and Rick Stiggins on p. 14 of this issue for more on balanced assessment systems.)

What We Know

Experts have described the distinct uses and limitations of summative, formative, and interim assessments (Perie, Marion, Gong, & Wurtzel, 2007). Summative assessments—administered at the end of a unit, semester, or year—cannot provide teachers with timely information on how to teach differently or what content to reteach to move students toward mastery. Large-scale summative assessments may be useful for ranking and comparing schools, districts, or programs, and they may yield disaggregated data that identify content areas in which particular groups of students are struggling. Their results may be useful in helping schools adjust the instructional program for the future. However, these standardized tests are not a good assessment choice for addressing students' current academic needs.

Formative assessments, in contrast, are administered frequently by teachers during an instructional unit to assess student learning as it happens. Used effectively, formative assessment provides information that helps the teacher adjust instruction to improve learning. Formative assessments take many forms. For example, a teacher might observe a small group of students discussing a character's internal conflict in the novel *Of Mice and Men* or read students' hypotheses about dominant genes in their science notebooks, and then use these formative measures to identify students who would benefit from further instruction on the concept.

Interim assessments fall between formative and summative assessments in both timing and purpose. Usually administered on a regular, preplanned schedule, they evaluate student progress on common content standards, or *benchmarks*, that students must master to be on track to reach end-of-year learning goals. Unlike summative assessments, however, interim assessments take place in time for teachers to adjust instruction to address any identified gaps in student mastery.

Some teachers have access to interim assessments that come with packaged assessment programs. However, researchers have found that a more effective approach is for teachers within a school to collaborate on developing common performance-based interim assessments (Heritage, 2007; Perie, Marion, Gong & Wurtzel, 2007; Stiggins & DuFour, 2009). Such assessments allow teachers to combine and compare data across classrooms and work together to develop appropriate instructional responses. One specific study, which examined five low-performing, high-poverty urban high schools in three districts and their use of data to inform school improvement, concluded that the more school staff worked collaboratively to discuss and analyze student performance the more likely staff members were to use data to inform curriculum decisions (Lachat & Smith, 2005).

Extensive research on assessment and learning shows that skilled use of formative assessment has a significant positive effect on student learning (Black & Wiliam, 1998; Heritage, 2007; Stiggins & DuFour, 2009). But for a formative assessment system to be effective, teachers must continually check students' learning and be willing to modify instruction to meet the student needs identified by the data. Both practices may require teacher change. To balance a school's assessment program with formative assessments, education leaders must ensure that teachers are supported in using this sometimes unfamiliar approach to instructional planning (Stiggins, 2005).

What You Can Do

To begin integrating formative assessment into a district system, Perie and colleagues (2007) recommend that district leaders build capacity for formative assessment practices and evaluate the effectiveness of these practices through teacher feedback and cost-benefit analyses. Key actions to build teacher confidence include providing professional development and ensuring ongoing support for teachers to collaborate in developing appropriate performance tasks. Finally, school staff must be willing to evaluate assessments in terms of the value they bring to student learning and instructional practice. Do the assessments in question actually improve instruction? Do they influence the way teachers converse with one another about teaching and learning?

Educators Take Note

Education leaders need to be knowledgeable and persuasive in advocating the use of a balanced assessment system. Before designing any new schoolwide or districtwide assessment, leaders must build commitment at all levels to a data-driven culture and to the new teacher practices this culture requires. A well-planned approach to balanced assessment will offer teachers, principals, and superintendents the different kinds of data they need to be well-informed decision makers.

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